Department of Purchasing Services
Michael J. Woodall, CPPO, Purchasing Agent
813/ 794-2221    Fax:  813/ 794-2111
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352/ 524-2221    e-mail: mwoodall@pasco.k12.fl.us
January 21, 2014

## M E M O R A N D U M

**TO:**          Honorable School Board Members

**FROM:**     Michael J. Woodall, CPPO, Purchasing Agent

**SUBJECT:**  QUEST Program: RFP 14-006-AZ, Local Instructional Improvement (LIIS) & Student
Information System (SIS)
Permission to Reject/Re-Solicit LIIS & Permission to Delay Recommendation SIS

The primary goal of this RFP was to identify and implement an LIIS as defined in the District's Race to
the Top grant, and to replace the current TERMS SIS. The goal was an integrated, enterprise-wide,
web-enabled system that is centrally located and managed. The RFP was developed and solicited in
the spring of 2013 and evaluated during the past summer. On September 3, 2013, official action
(attached) was taken to permit the QUEST evaluation team to view vendor demonstrations in
September and October. The following proposer's products were evaluated:
- LIIS: NCS Pearson's Schoolnet, and PCG/True North Logic
- SIS: PCG/Focus School Software, and Skyward

During the course of this extended solicitation timeline, the Office for Teaching & Learning and the
Office for Accountability, Research & Measurement encountered requirements for LIIS technology
systems deemed necessary to conduct current District business. The Evaluation Committee has
determined that some systems which have been implemented during this interval partially fulfill certain
LIIS technology requirements which were integral components of the QUEST RFP. The Committee has
concluded that the LIIS specifications as outlined in the RFP, demonstrated by the proposers, and
scored by the Committee, do not accurately reflect what the District now requires.

Dr. Peggy Jones, Director for Accountability, Research & Measurement, on behalf of the RFP
Evaluation Committee, has requested per the attached memo that the Board reject the LIIS portion of
RFP 14-006-AZ. A new RFP containing the District's updated technology requirements will be
developed and solicited as soon as possible. As interoperability with an LIIS system is critical, Dr.
Jones is also requesting on behalf of the Committee that a decision regarding an SIS system be
delayed until such time as an LIIS system is solicited, evaluated and approved by the Board.

Committee evaluation results are contained in the attached summary report from Center for
Educational Leadership and Technology (CELT), the District's contracted consultant on this project.
Please contact Dr. Jones or me if you have any questions or concerns.

MJW/az
Attachments

Date/Time:   January 14, 2014  09:20:00

January 21, 2014
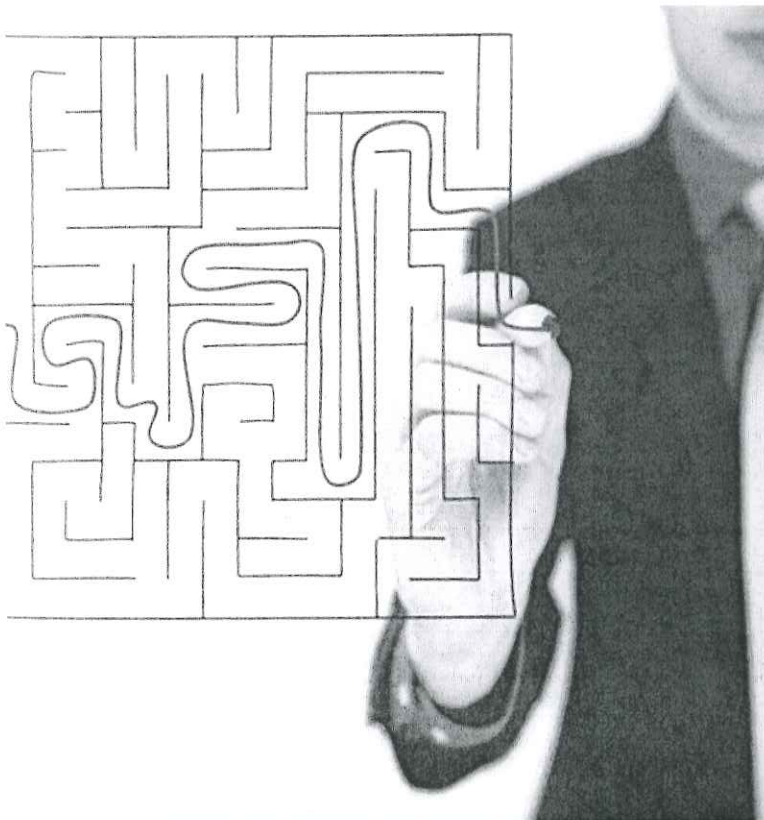
To:       Michael Woodall, Director
          Purchasing Services

From:    Peggy Jones, Ph.D., Director
          Accountability, Research, and Measurement

Subject:  QUEST Vendor Recommendation

It is the consensus of Quest Evaluation Committee that we reject the Local Instructional Improvement System (LIIS) portion and delay a recommendation on the Student Information System (SIS) portion.

/jg

# District School Board of Pasco County

## Final Evaluation Results (RFP 14-006-AZ)

Student Information System / Local Instruction Improvement System

Submitted by:

Center for Educational Leadership and
Technology (CELT)
65 West Boston Post Road,
Suite 200
Marlborough, MA 01752
Tel. (508) 624-4474

December 4, 2013

# Table of Contents

# Introduction

The District School Board of Pasco County (DSBPC) is seeking to replace its current Student Information System (SIS) with a state-of-the-art contemporary application. In addition, DSBPC seeks to procure a new Local Instructional Improvement System (LIIS) to meet its Race to the Top obligations. The Center for Educational Leadership and Technology (CELT) is providing technical assistance to the school district for a phased review process, the development of functional requirements, and the procurement of a combined SIS/LIIS system. The purpose of this report is to summarize the results of the evaluation of vendor proposals in response to the School District of Pasco County's Request for Proposals (**LIIS-SIS RFP # 14-006-AZ**).

On May 6, 2013 DSBPC released the **LIIS-SIS RFP # 14-006-AZ** for a Local Instructional Improvement System and Student Information System for public bid. The RFP was created based on input gathered from multiple needs gathering events that took place within the district over the last several months. These events included the convening a district LIIS-SIS Software Selection Committee, a review of current and future needs, surveys of district stakeholder groups on needs and desired components, and interviews and focus groups of district staff. Additional, contemporary specifications were also included from the current CELT work that matched the school district's vision.

The Purchasing Department accepted written questions through Monday, May 20, following which a pre-bid vendor conference was held on Thursday, May 23. A response to all questions was posted on May 28. While initially, the Selection Committee requested that proposals be submitted by teams representing both SIS and LIIS, it was determined in a discussion at the vendor conference, to accept proposals from vendors representing one product or the other on the condition that, if selected, they are willing to partner with another vendor for the implementation. At this time, the proposal submission date was extended to by two weeks to enable the greatest opportunity for participation.

The RFP submission deadline was Tuesday, June 25, 2013 at 2:00 p.m. EDT. DSBPC received three proposals from a total of five vendors. Three vendors partnered on a combined proposal for a combined SIS-LIIS solution; two vendors submitted individually for an SIS and LIIS solution respectively. This report reviews each component of the proposal individually (SIS and LIIS), and then in pairs (SIS-LIIS).

Subsequent to the proposal evaluation, vendors were invited to demonstrate their systems according to a script. In addition, customer reference checks were conducted and a few site visits for clarification. This report presents the result of this effort.

# Proposal Evaluation Process

As stated in the RFP document, the components made up the evaluation as listed below. Each component was normalized to a maximum of 300 points.

| Evaluation Criteria | Weighted Value |
|---|---|
| Technical Proposal (includes the following sections) | 80 |
| LIIS/SIS Response Forms (Appendices A and B) | 120 |
| **Maximum Weighted Value for Proposer's written RFP (Technical Proposal and Appendices)** | 200 |
| Cost Proposal Five (5) Year Life Cycle Costs (Appendix C) | 100 |
| **Maximum Possible Weighted Value for Phase I** | 300 |

The evaluation committee has completed the first stage of a two stage evaluation process. This stage consisted of an evaluation of the vendors' technical proposal followed by the analysis and scoring of the vendors' five-year life cycle costs. All vendors submitted strong proposals; the evaluation results are detailed on the following pages. As a result of the Phase I evaluation, the evaluation committee recommends that all proposers be considered as vendor finalists: PCG/Focus School Software/True North Logic, Skyward, and Pearson's Schoolnet. The finalists were invited to participate in Phase II of the LIIS-SIS software selection process, which consisted of three days of scripted software demonstrations – one day for the SIS and two days for the LIIS (the final day will include time for evaluators to review and submit scores).

# Technical Evaluation

The Technical proposal consisted of an evaluation of the proposer's responses to the technical requirements of the RFP (LIIS and SIS Functional Requirements) and an evaluation of the written proposals. A DSBPC LIIS-SIS proposal review team was formed consisting of district employees, representing District Leadership, Curriculum and Assessment, Information Technology, and Procurement departments.

The proposal review team read and conducted an in-depth review of each of the three (3) LIIS-SIS RFP written proposals between June 25, 2013 and July 25, 2013. The evaluation team members formally evaluated appropriate sections of each proposal in ten (10) categories:

1. Firm Qualifications
2. Project Management Approach
3. Proposed Technical Environment
4. Proposed Solution Approach
5. Proposed Program for Enhancements and Customizations
6. Testing Strategy
7. LIIS/SIS Data Conversion Strategy

8.  LIIS/SIS Software Support and Maintenance
9.  LIIS/SIS Security Strategy
10. LIIS/SIS Training Approach

## Written Proposal Evaluation Results

The district received three (3) proposals from the following vendors:

- Public Consulting Group/Focus School Software/True North Logic (Combined LIIS/SIS)

  Public Consulting Group (PCG), Inc. has proposed a partnership with Focus School Software (SIS) and Truenorthlogic (LIIS).  Founded in 1986, PCG is the prime in this partnership and will provide project management in addition to its LIIS component, EdPlan.  Headquartered in Boston, PCG has offices in Tallahassee and Ft. Lauderdale to support its Florida school districts.

  Based in Florida, Focus School Software was founded in 2006 and provides a fully integrated web-based student information system. Focus is currently implemented in 28 school districts in Florida. .

  Headquartered in Utah, Truenorthlogic (TNL) was founded in 2000 and provides solutions that focus on enhancing educator effectiveness.  TNL is currently working with five school districts in Florida, on meeting the Facilitator Profile requirements for an LIIS and is offered as an optional service in this RFP.

- NCS Pearson (Schoolnet – LIIS)

  Pearson Education offers a full range of instructional solutions for PK-12 through higher education and offers a variety of products supporting, student information, assessment, reporting and business solutions. Pearson has a relationship with the Florida Department of Education for assessment and provides an LMS platform for the Florida Virtual School In this proposal, Pearson is offering the Schoolnet's standalone Local Instructional Improvement System and, if chosen, will partner with a vendor that offers a Student Information system.

- Skyward (SIS)

  Founded in 1981, Skyward Is a privately-owned firm which offers a student information system and also an HR/finance system. Headquartered in Wisconsin, Skyward currently does business in 17 states and is implemented in 22 school districts in Florida. Skyward has proposed a stand-alone Student Information System and, if chosen, will partner with a vendor that offers a local instructional improvement system.

## Proposal Review

The LIIS-SIS RFP proposal review team's scores were tabulated and averaged to provide an overall rating for each of the major components of the written proposal evaluation.   Listed below are the results based on total possible points for each section:

| Vendor: | NCS Pearson | Skyward | PCG-Focus-TLN |
|---|---|---|---|
| Firm Qualifications Requirements - 12 points | 10.23 | 8.60 | 10.88 |
| Project Management Approach - 12 points | 9.62 | 7.12 | 10.06 |
| Proposed Technical Environment - 8 points | 6.04 | 6.00 | 6.42 |
| Proposed Solution Approach - 8 points | 6.82 | 6.58 | 7.04 |
| Proposed Approach to Enhancements - 4 points | 1.64 | 3.04 | 3.47 |
| Testing Strategy - 4 points | 2.84 | 3.30 | 3.43 |
| SIS and PD Data Conversion Strategy - 8 points | 8.00 | 5.67 | 6.67 |
| IIS & SIS Software Support and Maintenance - 8 points | 5.09 | 5.84 | 6.78 |
| Security Strategy - 4 points | **3.13** | **3.29** | **3.47** |
| Training Approach - 12 points | **8.09** | **7.77** | **10.28** |
| **Totals** | **61.50** | **57.21** | **68.50** |

# Functional Requirements Results

The committee developed a set of functional requirements for a Local Instructional Improvement System (Appendix A) and a Student Information System (Appendix B). Vendors were asked to indicate how well their solution met the functional requirements as listed in these appendices. Points were awarded depending on the vendors' responses including "yes", "planned", "under development", "customization". No points were awarded for a "no" response. Listed below are the results of those responses:

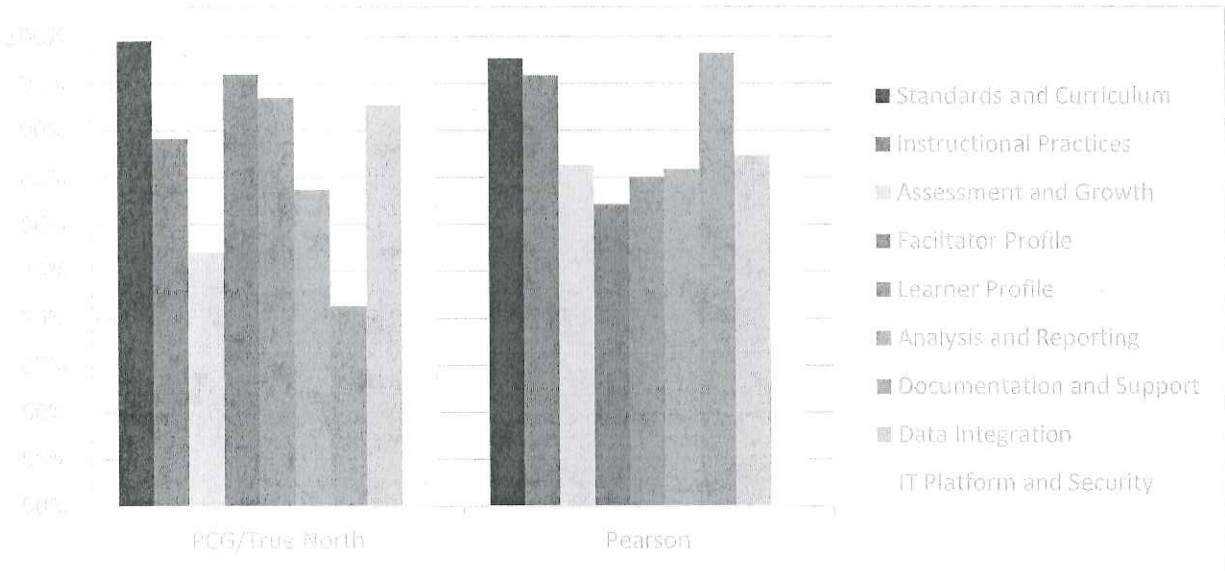## Local Instructional Improvement System

Vendors were asked to indicate how well their solution met the functional requirements as listed in Appendix A, the LIIS Requirements of the RFP. Listed below are the results of those responses:

### Appendix A - LIIS Requirements

|   | Section | Pts. Possible | PCG/True North | | Pearson | |
|---|---|---|---|---|---|---|
|   |   |   | Pts | % | Pts | % |
| 1 | Standards and Curriculum | 435 | 433 | 100% | 425 | 98% |
| 2 | Instructional Practices | 468 | 417 | 89% | 449 | 96% |
| 3 | Assessment and Growth | 1330 | 1025 | 77% | 1149 | 86% |
| 4 | Facilitator Profile | 936 | 898 | 96% | 769 | 82% |
| 5 | Learner Profile | 751 | 702 | 93% | 639 | 85% |
| 6 | Analysis and Reporting | 941 | 787 | 84% | 809 | 86% |
| 7 | Documentation and Support | 338 | 241 | 71% | 332 | 98% |
| 8 | Data Integration | 221 | 205 | 93% | 193 | 87% |
| 9 | IT Platform and Security | 658 | 641 | 97% | 583 | 89% |
|   | Total: | 6078 | 5349 | 88% | 5348 | 88% |
|   | Points (out of 60) |   |   | 52.82 |   | 52.77 |

### LIIS Requirements in bar graph format:



### LIIS Requirements in line graph format:

## Student Information System

Vendors were also asked to indicate how well their solution met the functional requirements as listed in Appendix B, the SIS Requirements of the RFP. Listed below are the results of those responses:
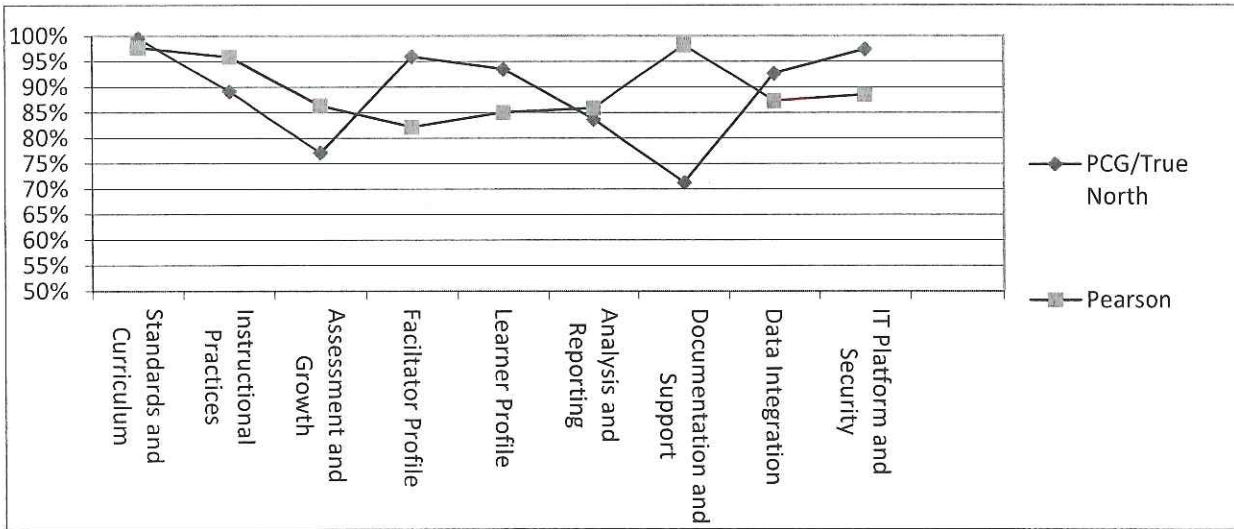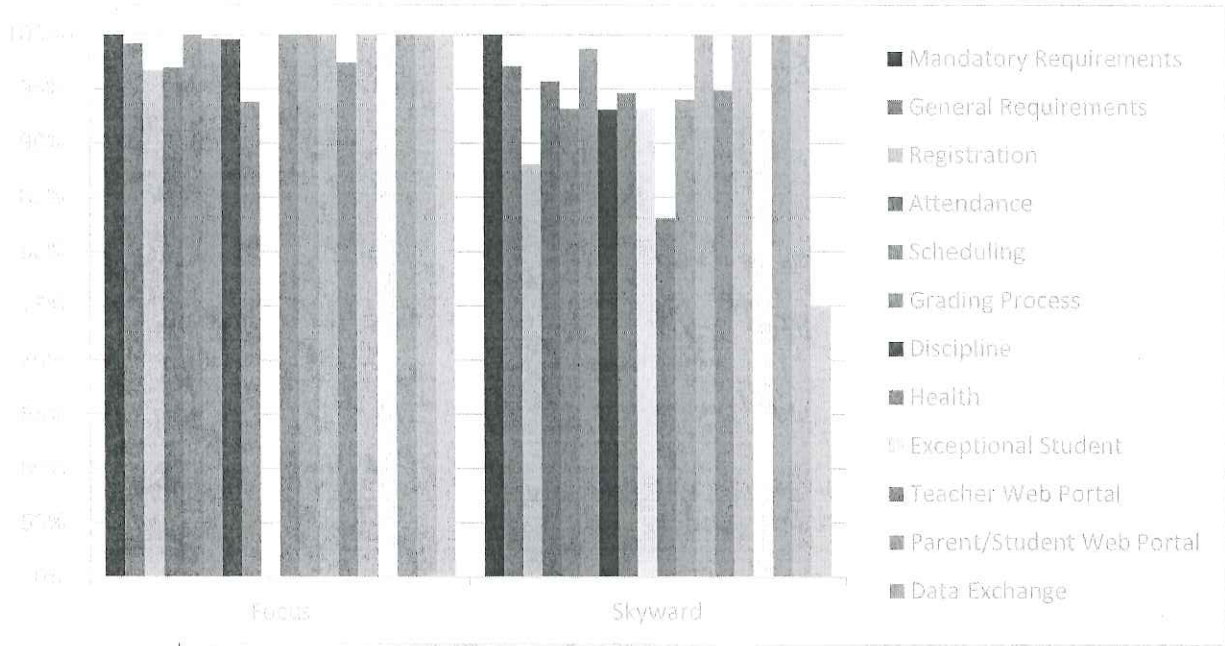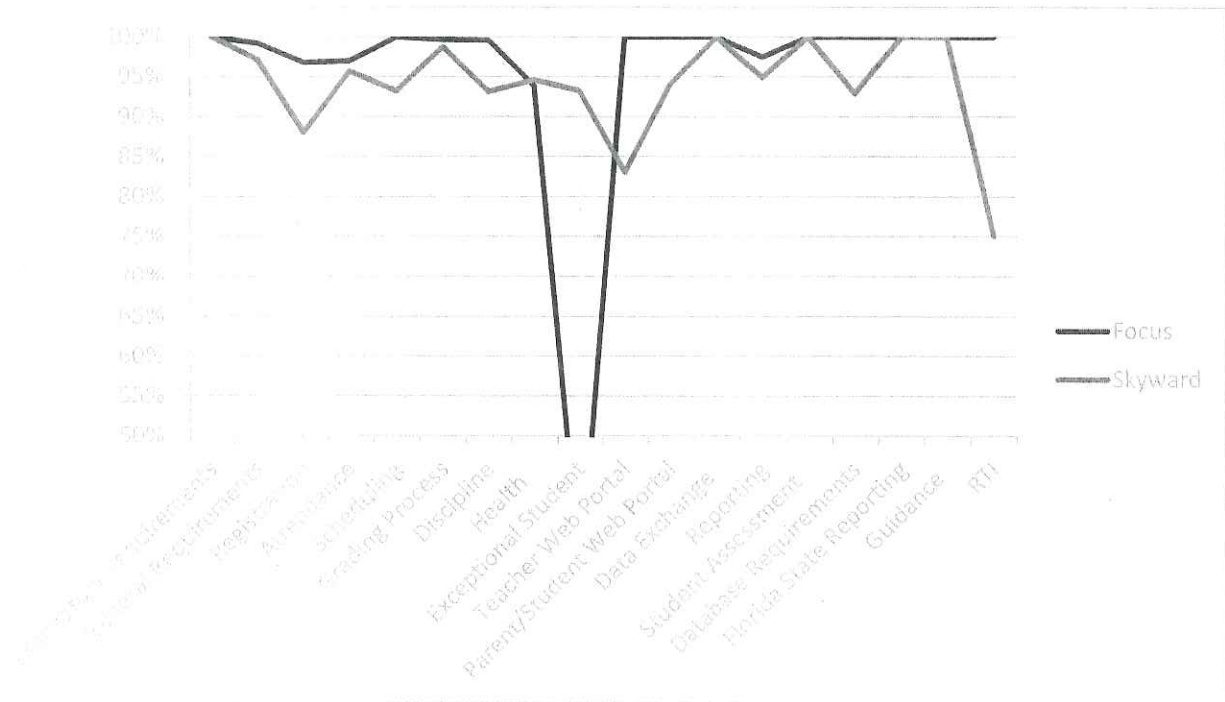
### Appendix B - SIS Requirements

| | Section | Pts. Poss | Focus | | Skyward | |
|---|---|---|---|---|---|---|
| | | | Pts | % | Pts | % |
| 1 | Mandatory Requirements | 70 | 70 | 100% | 70 | 100% |
| 2 | General Requirements | 621 | 616 | 99% | 603 | 97% |
| 3 | Registration | 581 | 562 | 95% | 511 | 88% |
| 4 | Attendance | 316 | 306 | 97% | 302 | 96% |
| 5 | Scheduling | 1070 | 1070 | 100% | 997 | 93% |
| 6 | Grading Process | 814 | 811 | 100% | 804 | 99% |
| 7 | Discipline | 374 | 372 | 100% | 348 | 93% |
| 8 | Health | 208 | 195 | 94% | 197 | 95% |
| 9 | Exceptional Student | 620 | 200 | 32% | 578 | 93% |
| 10 | Teacher Web Portal | 177 | 177 | 100% | 147 | 83% |
| 11 | Parent/Student Web Portal | 329 | 329 | 100% | 309 | 94% |
| 12 | Data Exchange | 115 | 115 | 100% | 115 | 100% |
| 13 | Reporting | 195 | 190 | 97% | 185 | 95% |
| 14 | Student Assessment | 213 | 213 | 100% | 213 | 100% |
| 15 | Database Requirements | 253 | 253 | 100% | 235 | 93% |
| 16 | Florida State Reporting | 70 | 70 | 100% | 70 | 100% |
| 17 | Guidance | 228 | 228 | 100% | 228 | 100% |
| 18 | RTI | 208 | 208 | 100% | 156 | 75% |
| | **Total:** | 6462 | 5985 | 93% | 6068 | 94% |
| | **Points** | | | 55.58 | | 56.35 |

### SIS Requirements in bar graph format:



### SIS Requirements in line graph format:

## Total Technical Results

As indicated earlier, vendor finalists were selected based on the highest scoring vendors for the technical proposal and cost evaluations. Listed below are the Phase I evaluation results that were used to select the three vendor finalists. The highest scorer for each of the evaluation components were given the maximum points for the component and the remaining vendors scores were prorated as a proportion of that result.

Because of the decision to accept proposals from vendors who represented only an SIS or LIIS in addition to those who offered both, a placeholder score was needed to ensure that the cost would not overshadow the technical points. The average of the scores of the other vendors was used for this purpose. For example, in Appendix A scoring, Skyward does not offer an LIIS. Rather than submit no score for this, the scores for the other two vendors in this category were averaged and used.

Ranking at this point, including Technical Proposal, Appendices A &B is listed below:

| Section | #Possible Points | Pearson Schoolnet* (LIIS only) | Skyward* (SIIS only) | PCG Focus TNL |
|---|---|---|---|---|
| Appendix A – LIIS | 60 | 52.77 | NA | 52.82 |
| Appendix B – SIS | 60 | NA | 56.35 | 55.58 |
| Technical Proposal | 80 | 61.52 | 57.21 | 68.49 |

## Demonstration Evaluation Results

Following the written evaluation of the technical proposal, vendors were invited to provide two full days of demonstrations following a detailed script prepared by the SDOC LIIS-SIS demonstration evaluation team. The SDOC LIIS-SIS demonstration evaluation team officially and independently scored the vendors on a five (5)-point (0-4) scale on all elements of the vendor script, which included the following seventeen categories:

*Student Information System (1 Day)*

SIS Overview, 2) General/Registration/Enrollment, 3) Special Programs/Health, 4) Scheduling/Master Schedule/ Batch/Walk-in Scheduling, 5) Attendance, 6) Grading/Report Card/GPA, 7) Gradebook, 8) Graduation/Transcripts/End of Year, 9) Discipline, 10) Query and Reporting, 11) State Reporting/Auditing, 12) Interoperability

*Local Instructional Improvement System (Day 2): Day 1`*

1) Company Overview, 2) Teacher Access, Dashboard, and Navigation 3) Standards, Curriculum, and Instruction, 4) Assessment Creation, Delivery, and Scoring, 5) Data and Content Integration,6) Security & System Administration,7) Instructional Planning, 8) Teacher/Student/Parent Portal, 9) Classroom Assessment

*Local Instructional Improvement System (Day 2): Day 1*

10) Data Analysis and Reporting, 11) Professional Development, 12) Educator Evaluation, 13) Training and Support

A cross-functional team of thirteen District employees participated in the six days of demonstrations between September 17 and October 2, 2013.

## SIS Demonstration Averages by Category

The demonstration evaluation summary results are as follows:

| Component | PCG-Focus | Skyward |
|---|---|---|
| SIS Overview | 3.15 | 3.31 |
| General/Reg./Enroll | 3.53 | 3.01 |
| Spec. Prog/Health | 3.42 | 3.00 |
| Scheduling/Master Schedule | 3.50 | 3.04 |
| Batch/Walk-in Scheduling | 3.61 | 3.03 |
| Attendance | 3.59 | 3.10 |
| Grading/Report Card/GPA | 3.57 | 3.05 |
| Gradebook | 3.50 | 3.07 |
| Grad/Trans/EOY | 3.59 | 3.08 |
| Discipline | 3.59 | 3.38 |
| Query and Reporting | 3.63 | 3.22 |
| State Reporting/Auditing | 3.69 | 3.13 |
| Interoperability | 3.52 | 3.33 |
| Total: | **3.53** | **3.13** |

## LIIS Demonstration Averages by Category

The demonstration evaluation summary results are as follows:

| Component | PCG-TrueNorthLogic | Pearson Schoolnet |
|---|---|---|
| LIIS Overview | 3.46 | 2.83 |
| Teacher Access, Dashboard, and Navigation | 3.32 | 2.86 |
| Standards, Curriculum, and Instruction | 3.32 | 2.88 |
| Assessment | 3.36 | 2.82 |
| Data and Content Integration | 3.36 | 3.75 |
| Security & System Administration | 3.40 | 1.25 |
| Instructional Planning | 3.42 | 3.08 |
| Teacher/Student/Parent Portal | 3.20 | 1.92 |
| Classroom Assessment | 3.50 | 1.42 |
| Data Analysis and Reporting | 3.31 | 3.08 |
| Professional Development | 3.35 | 2.25 |
| Educator Evaluation | 3.35 | 3.00 |
| Training and Support | 3.28 | 2.83 |
| Total: | **3.36** | **2.61** |

## Evaluation Committee Recommendation

During the course of the procurement, the landscape of available technology has changed as have the needs of the district. In addressing some of the immediate needs of the Curriculum Division and the Assessment and Accountability Department, systemic changes have been made that provide meet some of the needs that were part of the SIS-LIIS RFP. In addition, the district has been exploring the opportunity of investing in an operational data store which would provide a long-needed means of archiving historical data as well as providing a role-based dashboard. Given these changes within the district, it is more important than ever that the systems be interoperable.

At this time, the committee recommends a review of the current systems in terms of the desired goal to develop a data applications architecture (current and future state) and gap analysis and to rebid the LIIS using this information. .

# District School Board of Pasco County
# Bid Recommendation

| | | | | |
|---|---|---|---|---|
| **RFP Title** | Local Instructional Improvement (LIIS) & Student Information System (SIS) | | **Number of Vendors Notified** | 642 |
| **RFP Number** | 14-006-AZ | | **Number of Proposals Distributed** | 51 |
| **Date Solicited** | May 6, 2013 | | **Number of Vendors Proposing** | 3 |
| **Date Opened** | June 11, 2013 | | **Number of Formal "No Bid" Responses** | 1 |
| **Date Board Presentation** | September 3, 2013 | | **Funding Source** | Capital funds |
| **Total Savings** | N/A at this time | | **Grand Total of Proposal** | To be negotiated |

**Recommendation**: The primary goal of this RFP (known as the QUEST program) is to select a vendor to implement an LIIS/SIS as defined in the District's Race to the Top grant, and to replace the current TERMS SIS. We are seeking an integrated, enterprise, web-enabled system that is centrally located and managed. The new system will be configured around an enterprise relational database with the capacity to support the District's needs for the foreseeable future (10 years minimum). Proposals were reviewed during the first stage of a two-stage evaluation process.

The evaluation results are contained in the attached summary report from Center for Educational Leadership and Technology (CELT), the District's contracted consultant on this project. CELT provides assistance to the Evaluation Committee and Purchasing Department in the areas of proposal analysis, facilitation of the RFP and negotiation processes, and assistance with tabulation of the Evaluation Committee's scores.

Phase I consisted of an evaluation of the vendors' technical proposal followed by the analysis and scoring of their five-year life cycle costs. The Evaluation Committee recommends that all proposers be considered for Phase II, consisting of in-depth demonstrations (demos) of the companies' software and implementation capabilities. The recommended firms are:

- **PCG/Focus School Software/True North Logic**
- **Skyward**
- **NCS Pearson's Schoolnet**

District School Board
of Pasco County

SEP 0 3 2013

Board Approved

**Selection Process**: After the on-site demos, the Evaluation Committee may choose to conduct vendor site visits or phone interviews to clarify the proposers' capabilities. Final scoring by the Committee will then take place. It is anticipated that a recommendation regarding the highest-scoring proposer will be presented to the Board in December 2013, with a final contract, containing negotiated terms, conditions, scope of work and pricing, presented to the Board in the spring of 2014.

**Notations**: Approval of this recommendation will permit demo invitations to be issued immediately. Demo sessions will begin in mid-September at District Office, lasting through the beginning of October. CELT will continue to provide assistance to the Evaluation Committee during the demo/site visit/discovery period.

Offers from other proposers listed herein are the only offers received per the specified opening date and time. All other offers submitted in response to this solicitation, if any, are hereby rejected as late.

**Proposals Evaluated By**:
Chuck Hutinger, Supervisor Information Services/QUEST Project Manager
Tara King-Miller, Supervisor Accountability, Research & Measurement/QUEST Project Manager
Jeremy Blair, MTSS Specialist
Linda Brunner, Programmer/Analyst
David Chamberlin, Supervisor Student Support Programs
Hakija Halilic, Business Education Teacher, Gulf HS
Wendy Pineo, Elementary Education Teacher, Veterans Elementary School
Doreen Reed, Student Systems Data Entry Operator
Lori Wiggins, Assistant Principal, Pasco eSchool

Dr. Peggy Jones, Director for Accountability, Research & Measurement, and John Simon, Director for Technology and Information Services, serve as the non-voting co-Chairs of this committee.

Dr. Laurie Keating, CELT Senior Research Associate, and John Bowles, CELT Administrative Applications & Procurement Manager, facilitated evaluation of the proposal.

**Proposal Prepared By**:
Arlene S. Zimney, CPPB, C.P.M., Buying Manager
Dr. Laurie Keating, Senior Research Associate, CELT
John Bowles, Administrative Applications & Procurement Manager, CELT

**Reviewed and Authorized By**:
Michael J. Woodall, CPPO, Purchasing Agent

District School Board
of Pasco County

SEP 0 3 2013

Board Approved